华章科技

腾讯资深培训专家和移动互联网事业群副总裁撰写

马化腾高度评价并亲自作序

科技延伸媒介，媒介更新人文，人文重塑商业规则……

深刻解读移动互联网发展的本质与规律

人文

媒介

科技

THE TIMES CHANGE

Internet Building the New Big World

时代的变换

互联网构建新世界

徐昊 马斌 著

机械工业出版社
China Machine Press

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[illegible]“[illegible]”[illegible]

[illegible]

[illegible]DNA[illegible]

[illegible]“2014[illegible]WE[illegible]”[illegible]

[illegible]QQ[illegible]——[illegible]1[illegible]N[illegible]N[illegible]N[illegible]“N^2[illegible]”[illegible]

[illegible]

[illegible]90[illegible]80[illegible]

[illegible]“[illegible]”[illegible]——[illegible]

[illegible]“[illegible]7[illegible]”——[illegible]

[illegible]

[illegible]

[illegible]CEO[illegible]

2014[illegible]11[illegible]19[illegible]

[illegible]

“[illegible]”[illegible]

[illegible]“[illegible]”[illegible]

[illegible]“[illegible]”[illegible]

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[illegible]“[illegible]”——[illegible]

[illegible]“[illegible]”[illegible]“[illegible]”[illegible]

[illegible]66[illegible]“[illegible]”[illegible]66[illegible]“[illegible]”[illegible]79[illegible]“[illegible]”[illegible]“[illegible]”[illegible]“[illegible]”[illegible]

[illegible]

[illegible]

[illegible]“[illegible]”[illegible]

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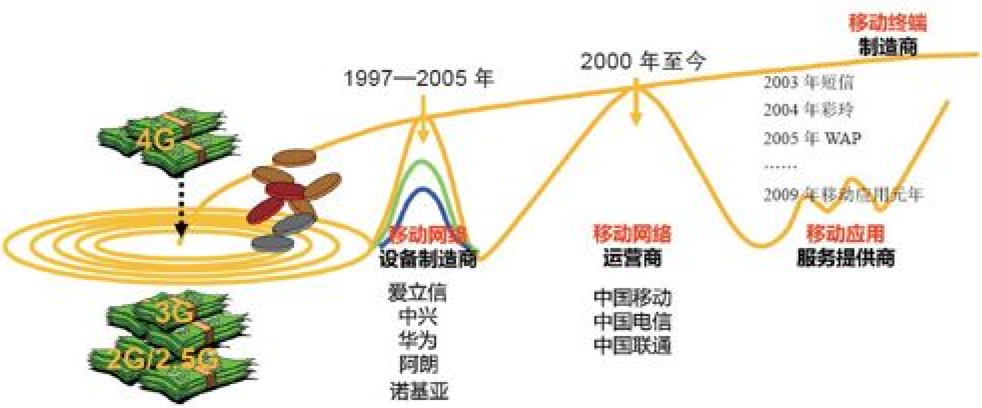
[illegible]

[illegible]

[illegible]

Let’s go[illegible]

[illegible]



4G
3G
2G/2.5G
1997—2005 年
2000 年至今
移动终端
制造商
2003 年短信
2004 年彩玲
2005 年 WAP
……
移动网络
设备制造商
爱立信
中兴
华为
阿朗
诺基亚
移动网络
运营商
中国移动
中国电信
中国联通
移动应用
服务提供商

[illegible]2[illegible]2G[illegible]2.5[illegible]2.5G[illegible]10000[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]1[illegible]1G[illegible]2[illegible]2G[illegible]2.5[illegible]2.5G[illegible]

[illegible]20[illegible]80[illegible]CEO[illegible]Bob Galvin[illegible]

[illegible]1987[illegible]1988[illegible]Dyna TAC[illegible]



[illegible]PPT[illegible]

[illegible]5~10[illegible]2005[illegible]

[illegible]

2006[illegible]6[illegible]

2006[illegible]12[illegible]1[illegible]

2009[illegible]7[illegible]25[illegible]

2010[illegible]7[illegible]19[illegible]12[illegible]

[illegible]2013[illegible]

2390[illegible]

[illegible]——[illegible]

[illegible]

[illegible]

[illegible]2014[illegible]9[illegible]30[illegible]1000[illegible]69[illegible]8[illegible]

[illegible]21[illegible]“[illegible]”[illegible]

1978[illegible]1987[illegible]1G[illegible]

1994[illegible]

[illegible]2006[illegible]2013[illegible]


中国移动2006－2013年总营收与总利润
营收（亿元人民币）
税后利润
7000
6000
5000
4000
3000
2000
1000
0
2954
3570
4123
4521
4852
5080
5604
6302
660
871
1128
1154
1196
1259
1293
1217
2006
2007
2008
2009
2010
2011
2012
2013

□□□□□□□□□□□□□□□□2006□2014□□□□□□

□□□□□□□□□□□□□□□□□4G□□□

[illegible]

“[illegible]”[illegible]

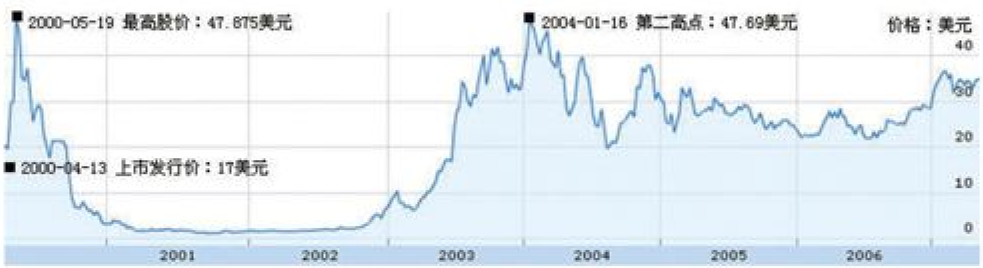
[illegible]2014[illegible]9[illegible]30[illegible]

[illegible]8[illegible]

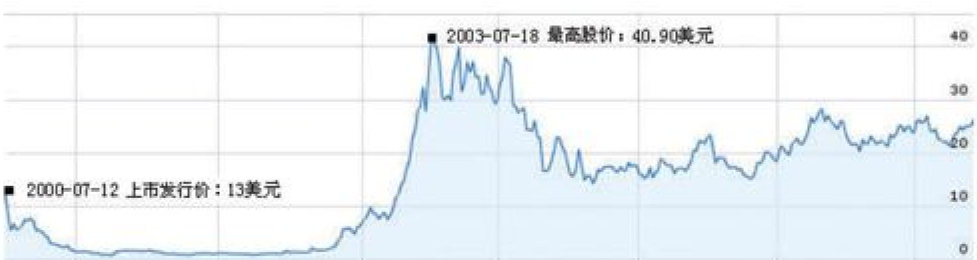
2001[illegible]2002[illegible]10[illegible]

[illegible]1.2[illegible]2003[illegible]10[illegible]40[illegible]

[illegible]



[illegible]2000[illegible]4[illegible]2006[illegible]



[illegible]2000[illegible]7[illegible]2006[illegible]

2003[illegible]

2003□□□□□□□□□□□□□□1500□□□□□□□□□□□□□150□□□□□□□□

2□□□□□□□□□□□□□□□□□□□□□□□1000□□□□□□□□□□□□□□□□□□□□□□

□□□

□□20%□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□

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TOM.COM□□□□□□□□□□□□□□□□□□□□□□□□□□□□

2004□□□□□□□□□□□□□□□□□□□□□2004□□□□□□□□□□16□□□□□

□□□□□□□□□□□□□□□□2006□□□□□□□7900□□□□2004□□□□□□□□□□□

□□□□□□□□□□□□□□□□□□□□□□□□□——□□□□□□□□□□□□□□□□□□□□□□

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2005□□WAP[1]□□□□□□□□□□□□□□□□WAP□□□□□□□□□□□□□□□

WAP□□□□2004□□□□□□□120%□□□□□□□□□□□5□□□□□□□□□□□□□□□

□□□□□SP□□□□□□Free WAP[2]□□□

2006□7□□□□□□□□□□□SP□□□□□□□□“11□□”□□SP□□□□□□□

□□□□□□□□□□□□□SP□□□□□□□□□48□□□□□□□□□□□□□□□□□□□□□□“□

□□□”□□SP□□□□□□□□□□□□□□□□70%~80%□□□□□□□20%□□“11□□

□”□□□

□□□□□□□□□□□2009□□□□□□□□□□□□□□□□□□□□□□□□

2009□□□□3G□□[3]□□□□□□□□□□□□□□□□□□□2009□□□□□

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□□□□□□□□2004□6□16□□□□0.68□□/□□□3.375□□□□□□□□□□

□2014□8□29□□134□□/□□□K□□□10□□□197□□□□□□□□□□□□□

□□

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[1] WAP□Wireless Application Protocol□□□□□□□□□□□□□□□□□

TCP/IP□□□□

[2] SP□Service Provider□□□□□□□□□□□□□□□□□□□□□□□□□□□□

□□□□□□□□□□□□□□□□□□□□Free WAP□□□□□□□□□□□□□□□□□□□

□□□□□□□□□□□Free WAP□

[3] 2009[illegible]3G[illegible]3G[illegible]

[illegible]

“[illegible]……”2006[illegible]

[illegible]“[illegible]”[illegible]

1973[illegible]·[illegible]”[illegible]·[illegible]“[illegible]”[illegible]

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[illegible]2007[illegible]iPhone[illegible]35[illegible]13[illegible]2008[illegible]2012[illegible]8[illegible]

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[illegible]

——[illegible]1856—1939[illegible]

[illegible]



[illegible]

[illegible][1][illegible]

[illegible]——[illegible]

[illegible]——[illegible]——[illegible]3G[illegible]4G[illegible]

[illegible]

[illegible]“[illegible]”[illegible]

[1] [illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]PC[illegible]

[illegible]1G[illegible]“[illegible]”[illegible]2[illegible]0.5[illegible]

[illegible]2G[illegible]

“[illegible]”[illegible]



[illegible]2014[illegible]9[illegible]

[illegible]2014[illegible]9[illegible]93.5[illegible]18.6[illegible]

[illegible]

[illegible]

[illegible]

[illegible]2013[illegible]“[illegible]”[illegible]

[illegible]2013[illegible]3[illegible]31[illegible]“[illegible]”[illegible]2013[illegible]4[illegible]23[illegible]“[illegible]”[illegible]

[illegible]

[illegible]2G[illegible]3G[illegible]

[illegible]……[illegible]——[illegible]

[illegible]“[illegible]”[illegible]

[illegible]

[illegible]

[illegible]2009[illegible]

[illegible]……

[illegible]3G[illegible]3G[illegible]

[illegible]2010[illegible]57.10%[illegible]2014[illegible]9[illegible]42.30%[illegible]


100%
80%
60%
40%
20%
0%
6.10%
36.80%
57.10%
8.30%
37.40%
54.30%
11.80%
37.00%
51.20%
17.00%
36.20%
46.80%
22.10%
35.60%
42.30%
2010
2011
2012
2013
2014.9
移动数据及互联网业务收入占比
其他非语音业务收入占比
话音业务收入占比


2013—2014年移动短信业务量和收入情况
移动短信业务量同比增长
移动短信业务收入同比增长
10.0%
5.0%
0.0%
-5.0%
-10.0%
-15.0%
-20.0%
-25.0%
-10.0%
0.7%
0.5%
2.3%
2.6%
2.5%
2.8%
3.2%
3.0%
2.8%
1.6%
-0.6%
8.0%
-21.3%
-2.1%
-1.7%
-1.6%
-1.5%
-1.6%
-1.4%
-1.4%
-1.3%
-1.6%
-1.9%
-4.5%
-13.8%
-12.3%
-13.2%
-18.7%
-18.4%
-17.7%
-17.9%
2013年1月
2014年1月

2014□1~9□□□□□□□□□□□5725.6□□□□□□□17.9%□

□□□□□□□□□□□□□□□□□□□□□□□19%□□□□□□□□□□□□□47.9%□□□□□□□□□□0.5□□□□□□□□□□□□□□□□□□□□□□□□□□□□

□□□□□□□□□38.2□□□□□□9.3□□

□□□□□□□□□□□□14.1%□□□□□65□□□□□□□□□□□□□□□□□□□5.4%□□□4.6%□

2014□1~9□□□□□□□□□479.7□□□□□□□29.8%□□□□□□□□□□□□□□□□□□□□□□

□□□□□□□□□□□2□□

□□2013□□□□□□□□□□□□□□□□□□□□□□□Line□Whatapp□□□□□□□□□□□□□□□□□□□□□□

□□

□□□□□□□□□□



[illegible]

[illegible]4.38[illegible]QQ[illegible]8.29[illegible]QQ[illegible]2[illegible][1][illegible]

[illegible]

[illegible]

[illegible]

[illegible]2014[illegible]



2014年各月移动互联网接入流量和户均流量比较
（万G）
（M）
20,000
16,000
12,000
8,000
4,000
-
200
180
160
140
13,263
12,825
14,564
14,445
15,564
15,960
17,009
17,713
18,593
165
161
166
168
172
175
179
183
187
2014年1月
2014年1月-2月
2014年1月-3月
2014年1月-4月
2014年1月-5月
2014年1月-6月
2014年1月-7月
2014年1月-8月
2014年1月-9月
移动互联网接入流量(万G)
户均移动互联网流量（M）

[illegible]

[illegible]

[illegible]/IBM[illegible]



[illegible]–[illegible]/IBM[illegible]

[illegible]“[illegible]”[illegible]

[illegible]2013[illegible]50%[illegible]2010[illegible]

57.10%[illegible]46.8%[illegible]2013[illegible]“[illegible]”[illegible]

“[illegible]”[illegible]

[illegible]“[illegible]”[illegible]

[illegible]



□□□□□□□□□□□□□2008—2013□□□□

□□□——“□□”□“□”□□□□□□“□”□□□□□□□□□□□□□□□□□

[1] □□□□□□□2014□□□□□□□□

第五章　从用户实际体验看移动通信的发展

从用户直观体验来看，第二代移动通信技术（2G）、第三代移动通信（3G）、第四代移动通信技术（4G）的演进过程是这样的：

首先，在2G时代，用户开始感受到移动通信的优势——随时随地可以进行语音通话、发送短信；其次，在3G时代，用户开始感受到移动互联网的魅力——随时随地可以访问互联网；最后，在4G时代，用户开始感受到移动宽带的巨大价值。

本章将以用户体验为4G入手，从用户体验的角度分析移动通信技术的演进特别是4G移动通信技术带给用户的直观体验。

首先，从1G的模拟语音通信技术过渡到2G的数字语音通信技术，移动通信的语音质量、保密性能、系统容量都得到了很大提升，并开始支持短信等简单的数据业务，为后续的移动数据业务发展奠定了基础。

其次，在3G时代，移动数据业务得到了快速发展。在2G时代，移动数据业务速率一般为20~60Kbps，用户数据业务速率为Kbps量级，只能支持简单的数据业务，而在这一时代，手机上网浏览网页、收发邮件等成为了可能。

最后，在4G时代，移动宽带业务速率得到极大提升，用户体验到了真正意义上的移动宽带业务，移动数据速率达到数十Mbps，用户数据流量消耗达到数GB量级，移动视频、移动游戏等大流量业务成为主流，用户随时随地

[illegible]1GB[illegible]3G[illegible]
[illegible]4G[illegible]

[illegible]10MB[illegible]3[illegible]

[illegible]

[illegible]

[illegible]2005[illegible]Internet of Things[illegible]

[illegible]

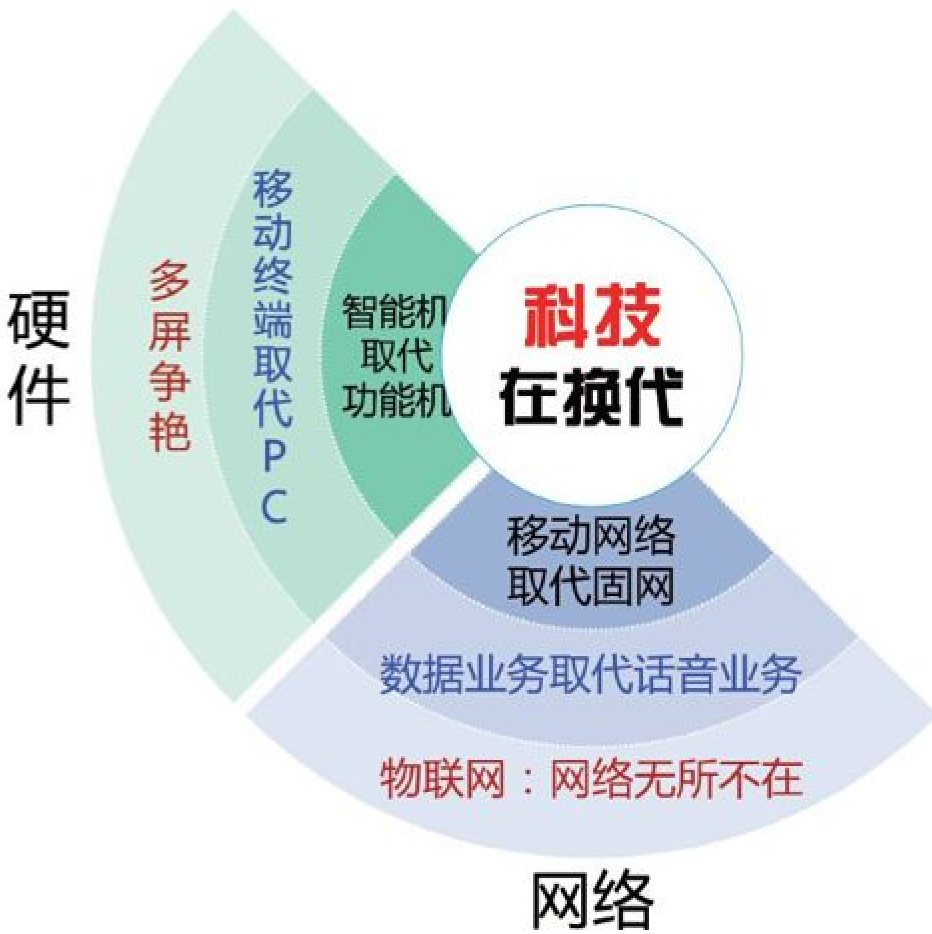
[illegible]LG[illegible]

[illegible]

[illegible]“[illegible]5[illegible]5[illegible]5[illegible]”

[illegible]

[illegible]


硬件
多屏争艳
移动终端取代PC
智能机取代功能机
科技在换代
移动网络取代固网
数据业务取代话音业务
物联网：网络无所不在
网络

[illegible]

[illegible]PAD[illegible]

“[illegible]”[illegible]“[illegible]”[illegible]“[illegible]”[illegible]CPU[illegible]

[illegible]PAD[illegible]

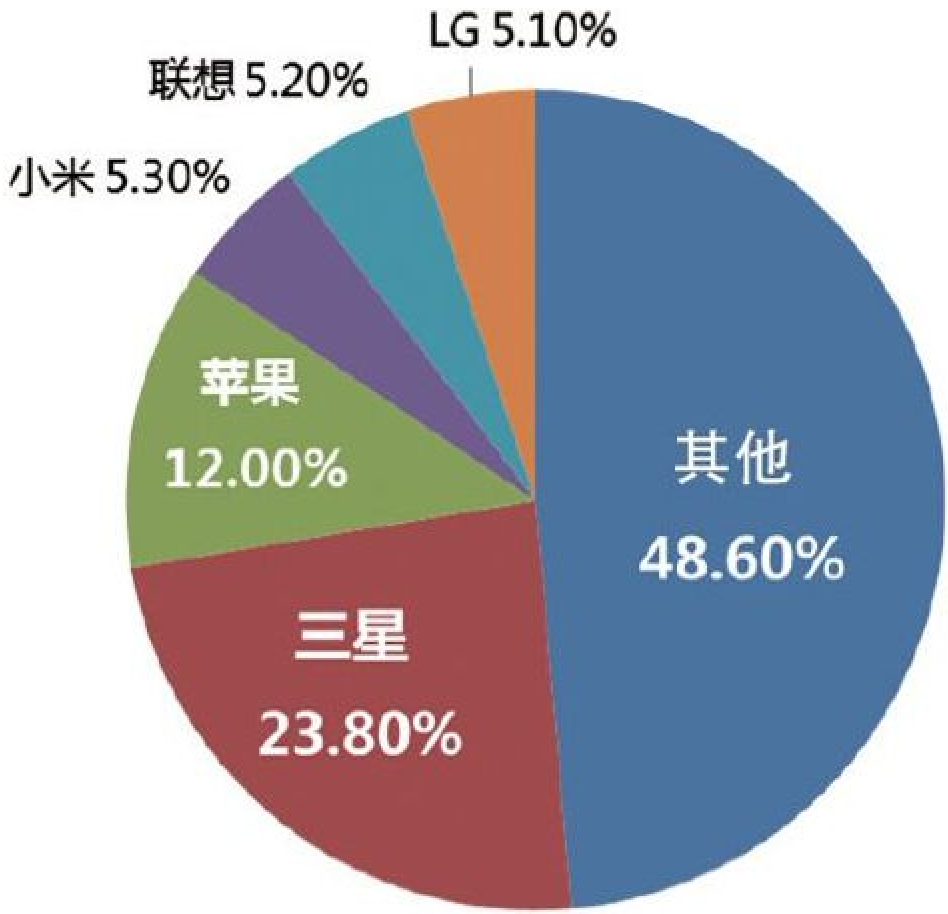
[illegible]

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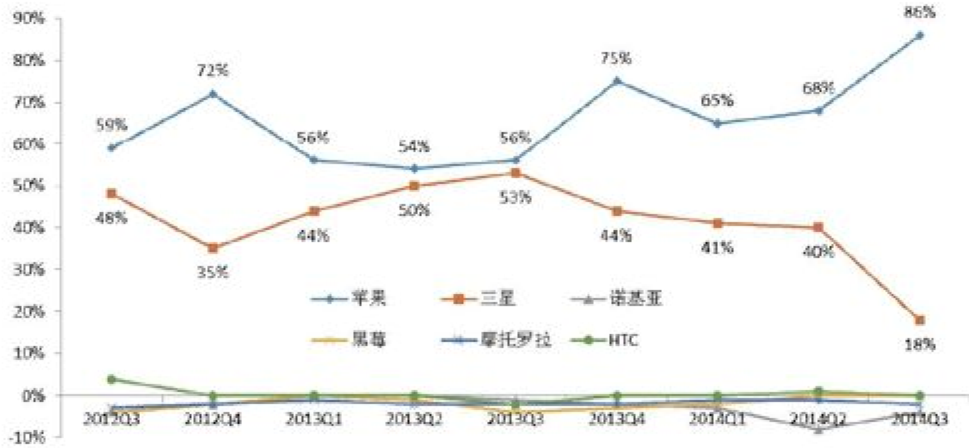
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[illegible]3G[illegible]4G[illegible]



[illegible]IDC 2014[illegible]5[illegible]LG[illegible]23.80%[illegible]12.00%[illegible]5.30%[illegible]5.20%[illegible]LG[illegible]5.10%[illegible]48.60%[illegible]HTC[illegible]

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2012Q3[illegible]2014Q3[illegible]Canaccord Genuity[illegible]

[illegible]2014[illegible]86%[illegible]18%[illegible]104%[illegible]100%[illegible]4%[illegible]

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[illegible]ARM[illegible]

[illegible]PC[illegible]PC[illegible]“[illegible]”[illegible]1994[illegible]74%[illegible]2000[illegible]

[illegible]PC[illegible]CEO[illegible]2006[illegible]6[illegible]

[illegible]XScale[illegible]Marvell[illegible]ARM[illegible]

[illegible]ARM[illegible]ARM[illegible]CPU[illegible]ARM[illegible]ARM[illegible]……

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[illegible]PAD[illegible]PAD[illegible]PAD[illegible]PAD[illegible]PAD[illegible]

PAD[illegible]2002[illegible]·[illegible]2005[illegible]Windows[illegible]2010[illegible]iPad[illegible]PAD[illegible]

PAD[illegible]PC[illegible]PAD[illegible]PC[illegible]PAD[illegible]PAD[illegible]PC[illegible]PC[illegible]PAD[illegible]PC[illegible]PAD[illegible]



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[illegible]Watch[illegible]Siri[illegible]



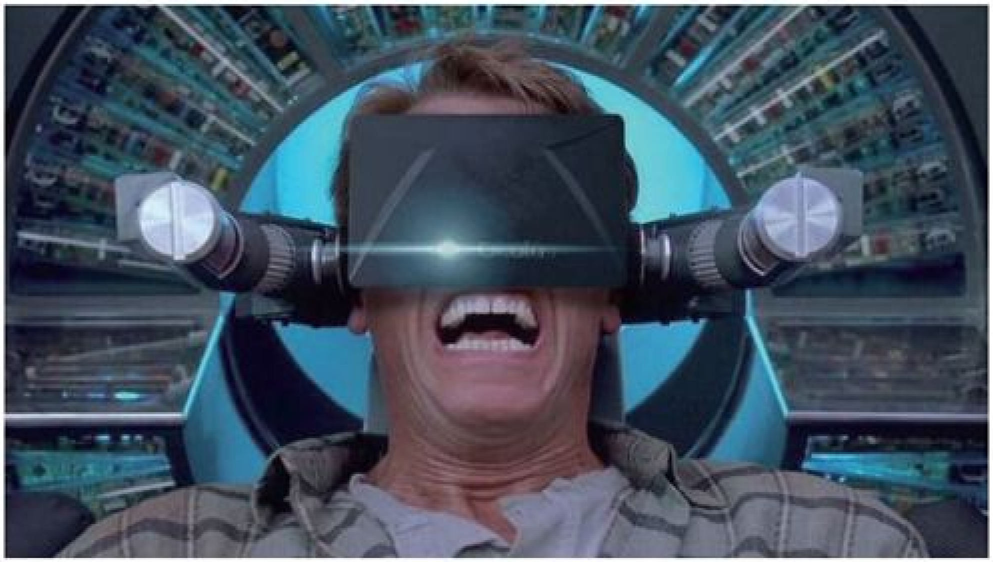
[illegible]2014[illegible]1[illegible]NBA[illegible]

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[illegible]56[illegible]

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[illegible]2014[illegible]6[illegible]HomeKit[illegible]HomeKit[illegible]

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[illegible]“[illegible]”

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[illegible]OBD[illegible]ABS[illegible]EBD/CBC[illegible]EBA/BAS/BA[illegible]ASR/TCS/TRC[illegible]ESP/DSC/VSC[illegible]ITS[illegible]CAN[illegible]RFID[illegible]……[illegible]



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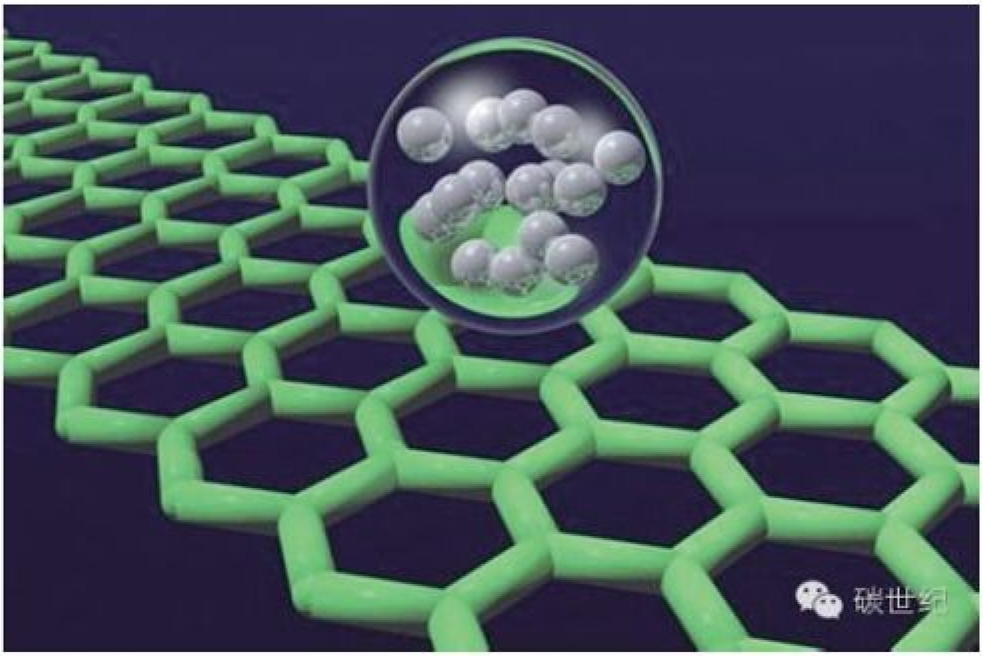
[illegible]2014[illegible]5[illegible]11.73[illegible]11.28%[illegible]GMIC[illegible]——[illegible]1[illegible]OBD[illegible]4[illegible]21[illegible]CarNet[illegible]7[illegible]4[illegible]“[illegible]”[illegible]BAT[illegible]

[illegible]20[illegible]2012[illegible]5[illegible]2015[illegible]2017[illegible]

[illegible]

[illegible]

[illegible]



[illegible]2004[illegible]·[illegible]·[illegible]2010[illegible]

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1996□“□□”□□□

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[illegible]“[illegible]”

[illegible]“[illegible]”[illegible]

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[illegible]Bing[illegible]2014[illegible]5[illegible]29[illegible]——“[illegible]”[illegible]1500[illegible]0.7%[illegible]“[illegible]”[illegible]“[illegible]”[illegible]6[illegible]

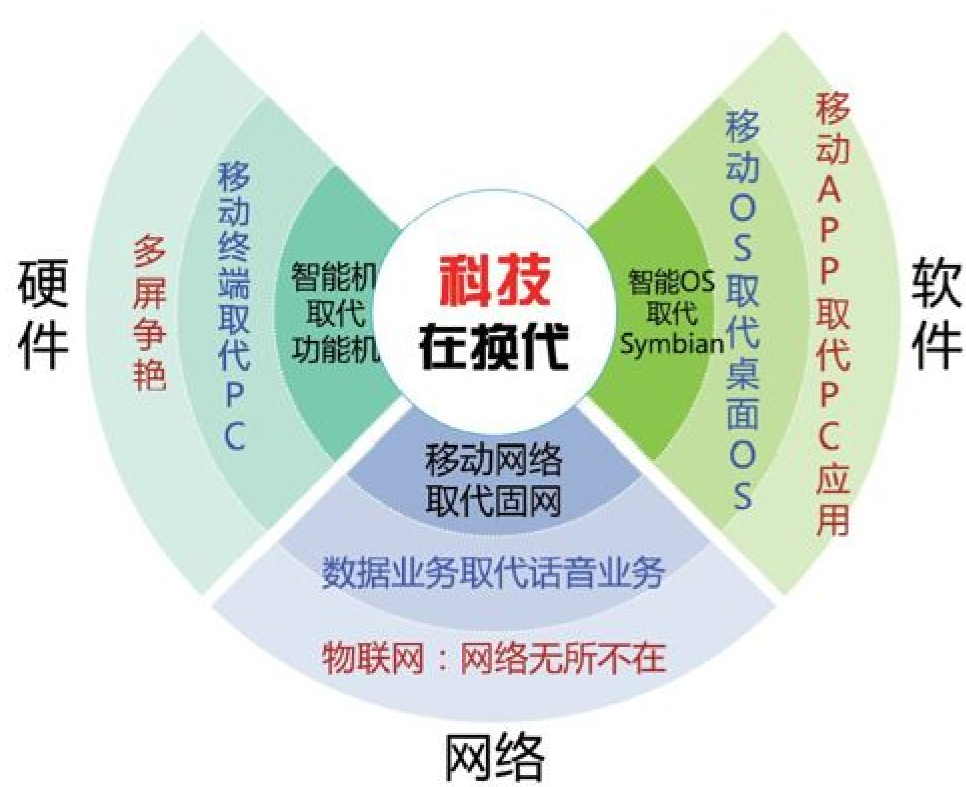
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科技
在换代
硬件
多屏争艳
移动终端取代PC
智能机取代功能机
软件
智能OS取代Symbian
移动OS取代桌面OS
移动APP取代PC应用
网络
移动网络取代固网
数据业务取代话音业务
物联网：网络无所不在

[illegible]Android[illegible]iOS[illegible]

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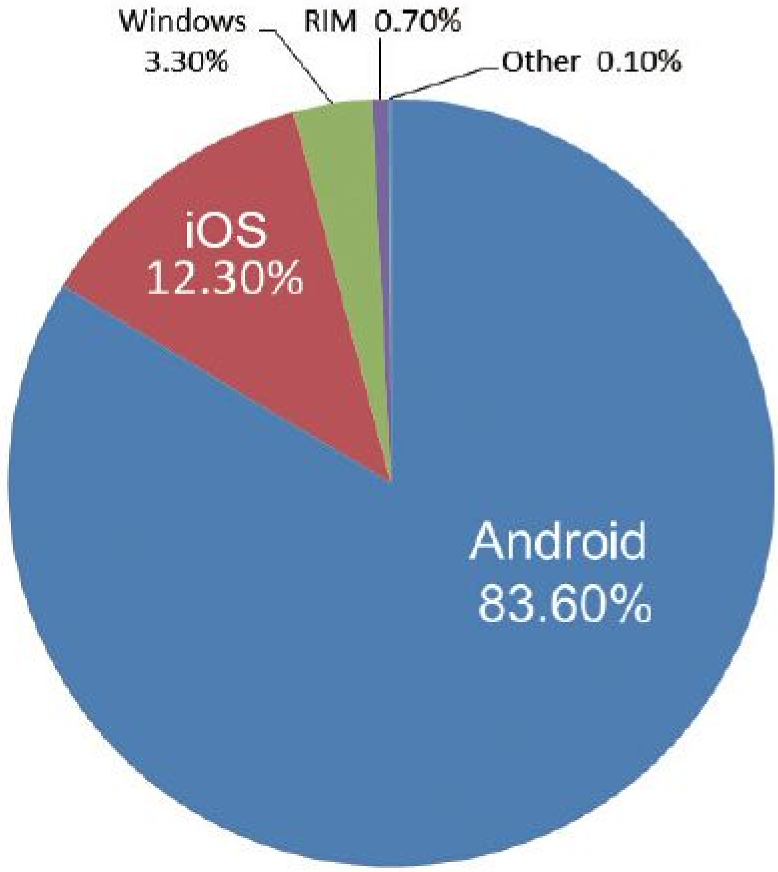
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Symbian[illegible]

[illegible]Android/iOS[illegible]Symbian[illegible]Windows Phone[illegible]

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2014[illegible]9[illegible]·[illegible]810[illegible]
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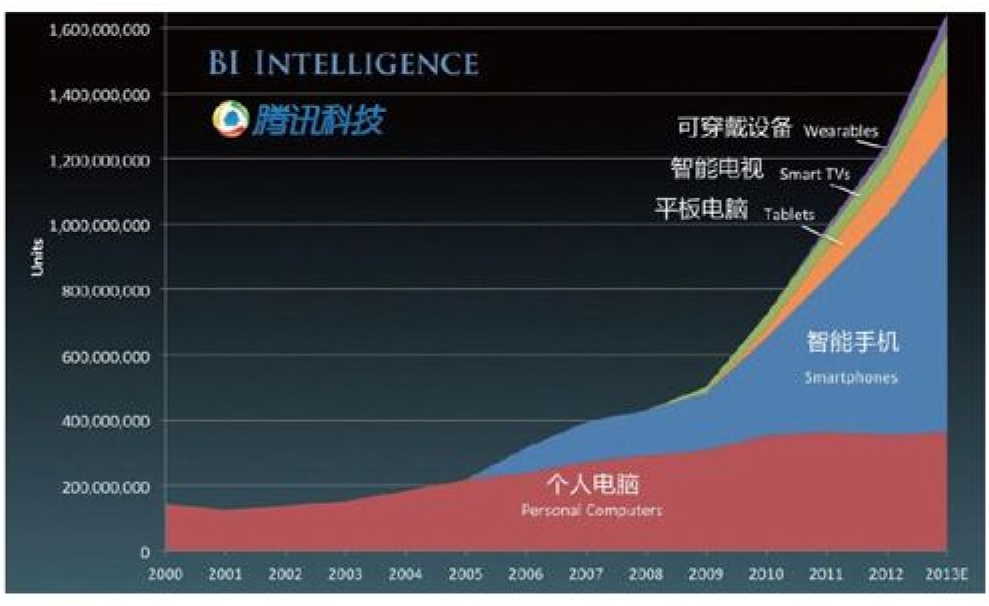
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[illegible]QQ[illegible]QQ[illegible]24[illegible]

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[illegible]APP[illegible]PC[illegible]

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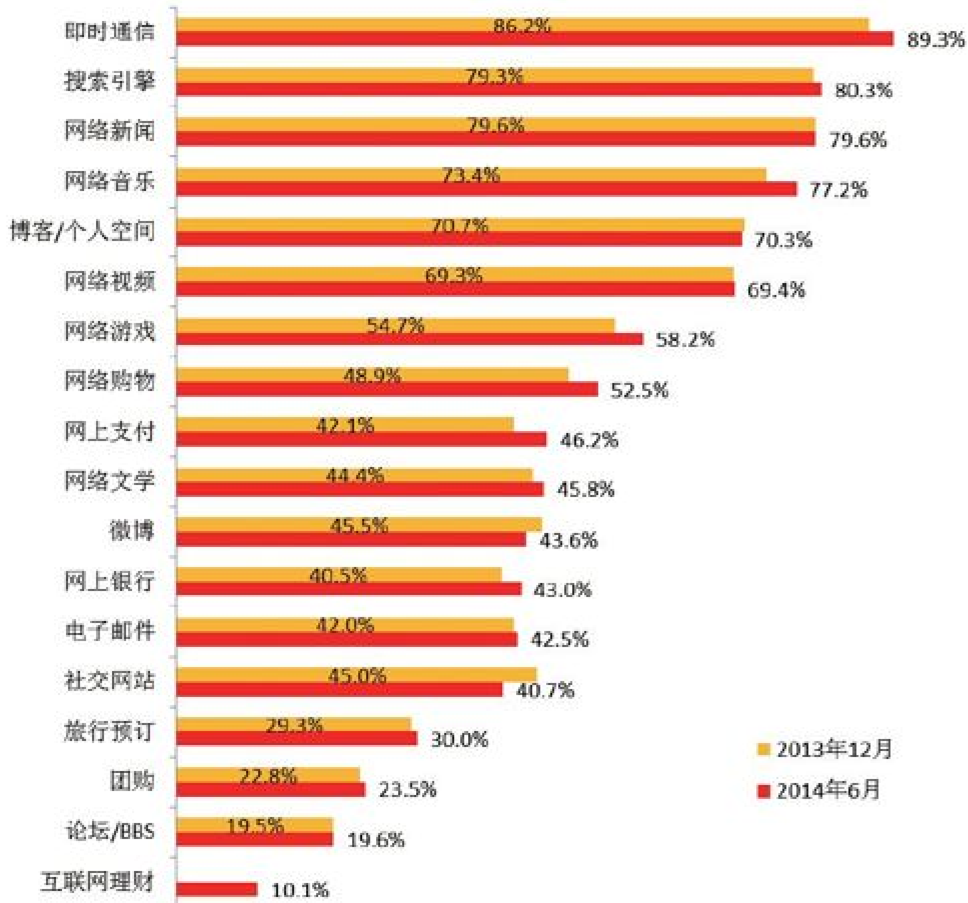
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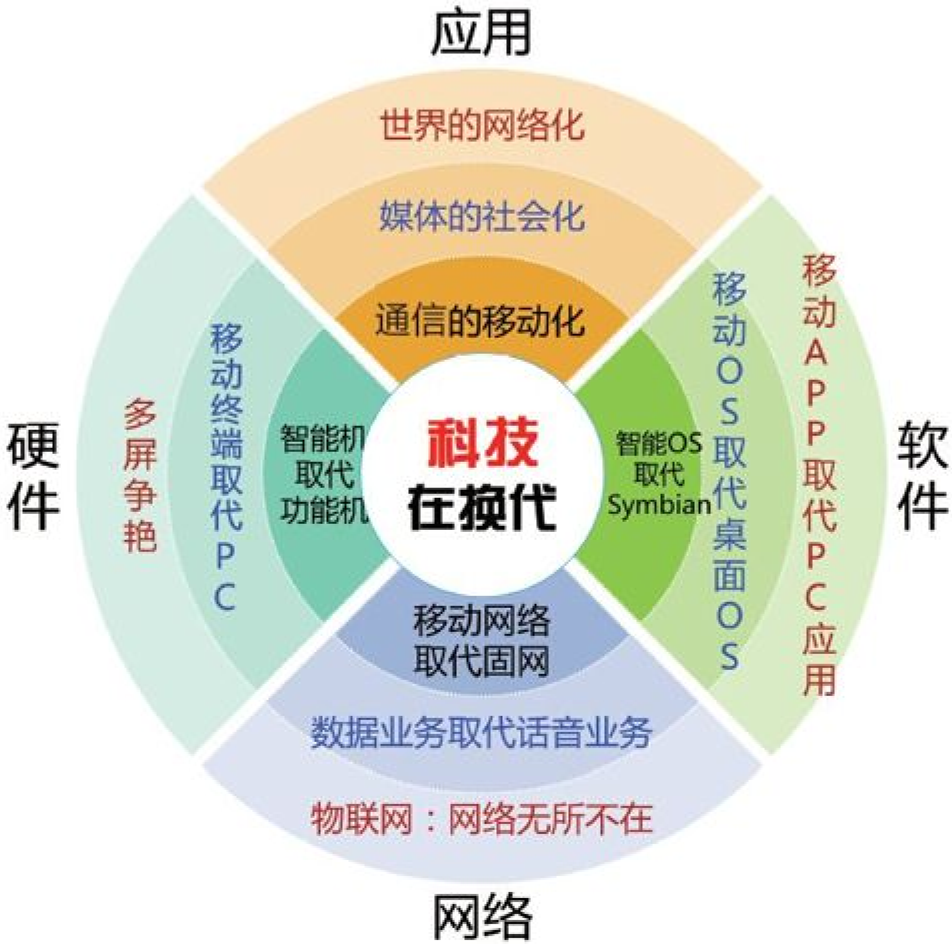
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[illegible]Office[illegible]Word[illegible]Excel[illegible]PPT[illegible]QQ[illegible]

[illegible]Google Docs[illegible]Office[illegible]

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应用
世界的网络化
媒体的社会化
通信的移动化
硬件
多屏争艳
移动终端取代PC
智能机取代功能机
科技在换代
智能OS取代Symbian
移动OS取代桌面OS
移动APP取代PC应用
软件
移动网络取代固网
数据业务取代话音业务
物联网：网络无所不在
网络

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[illegible]3G[illegible]3G[illegible]WiFi[illegible]

2014[illegible]9[illegible]12.73[illegible]0.44%[illegible]0.5%[illegible]

[illegible]14[illegible]——[illegible]


中国手机用户增长情况分析
移动电话用户(亿)
相比上月增速
11.55
11.65
11.76
11.85
11.96
12.07
12.16
12.23
12.29
12.35
12.40
12.48
12.52
12.56
12.60
12.63
12.67
12.73
0.88%
0.91%
0.80%
0.88%
0.91%
0.77%
0.62%
0.47%
0.50%
0.37%
0.70%
0.28%
0.36%
0.32%
0.24%
0.28%
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2013年4月
2013年5月
2013年6月
2013年7月
2013年8月
2013年9月
2013年10月
2013年11月
2013年12月
2014年1月
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2014年9月

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[illegible]

[illegible]2006[illegible]3000[illegible]

“[illegible]”[illegible]“12[illegible]25[illegible]79[illegible]‘YOU’[illegible]‘[illegible]’[illegible]‘[illegible]’[illegible]”[1]

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2010□11□3□□□6□□□□□□□□□□□□360□□□□□□□□QQ□□□□□□360□□□□□QQ□

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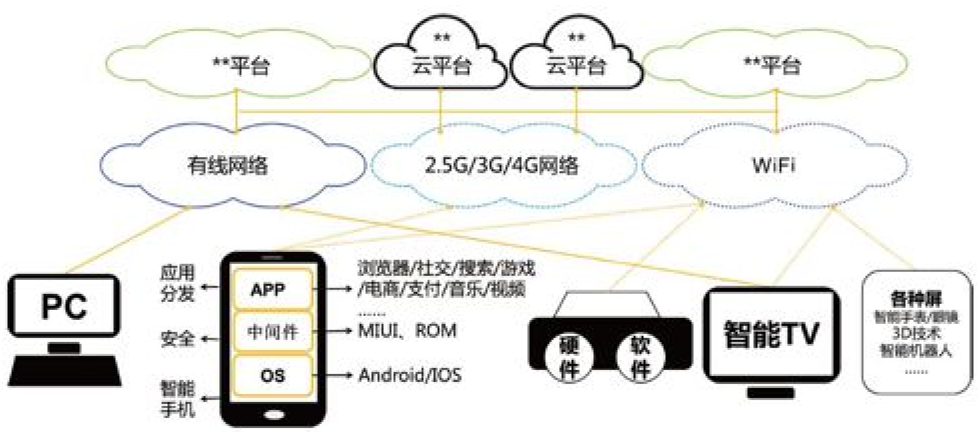
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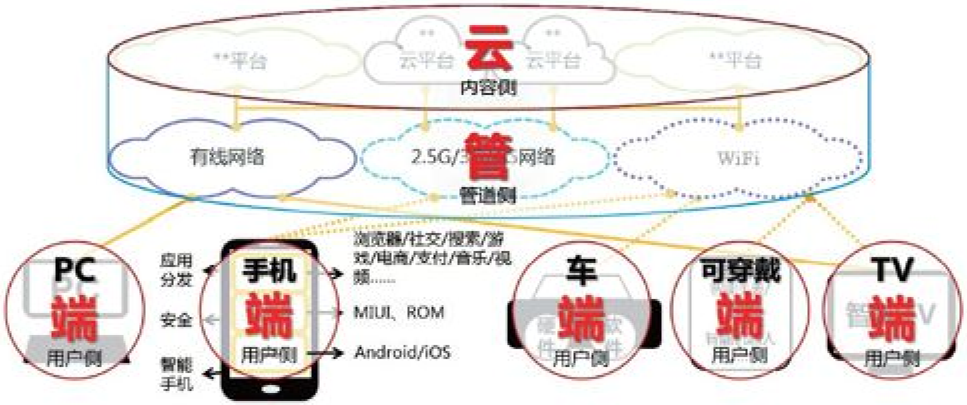
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服务场景之争
有线网络
2.5G/3G/4G网络
WIFI
……
办公室
计算机
游牧中
智能手机
家
智能电视
智能家居
车中
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小区
小区服务
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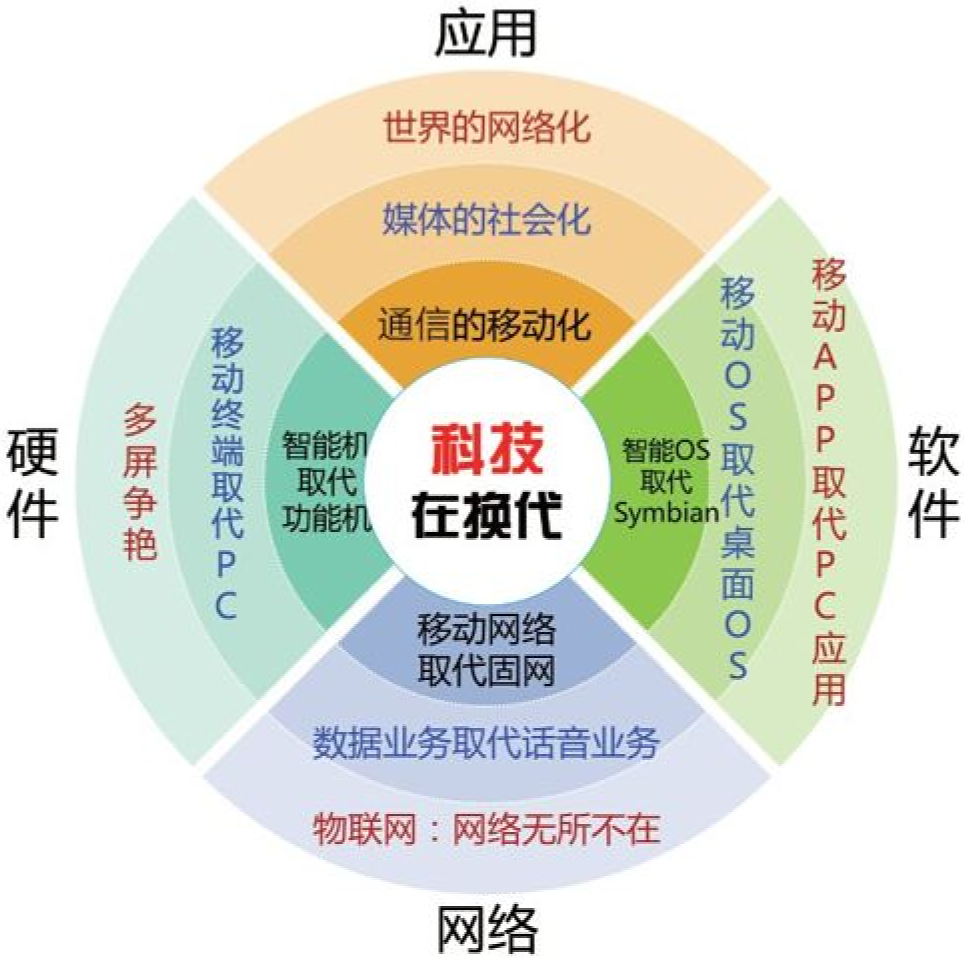
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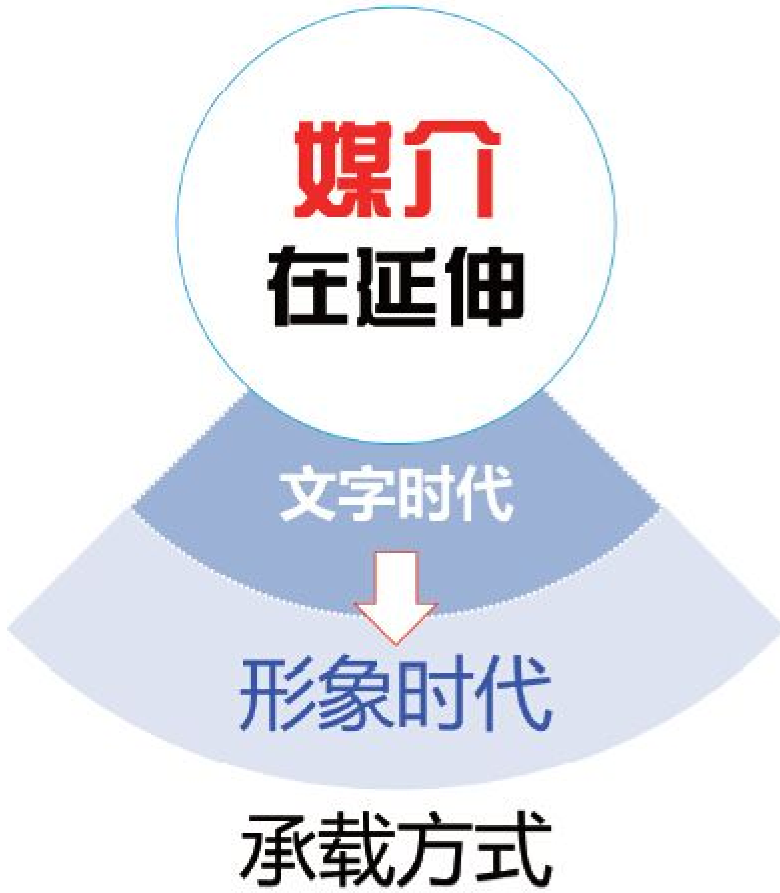
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媒介
在延伸
文字时代
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[illegible]CNNIC[illegible]34[illegible]2014[illegible]6[illegible]4.39[illegible]2013[illegible]1057[illegible]69.4%[illegible]2.94[illegible]2013[illegible]4709[illegible]19.1%[illegible]


2013.12-2014.6 网络视频/手机网络视频
用户规模及使用率
万人
图表区
50000
40000
30000
20000
10000
0
69.3%
69.4%
42820
43877
49.3%
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24669
29378
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2013.12
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网络视频用户规模
手机网络视频用户规模
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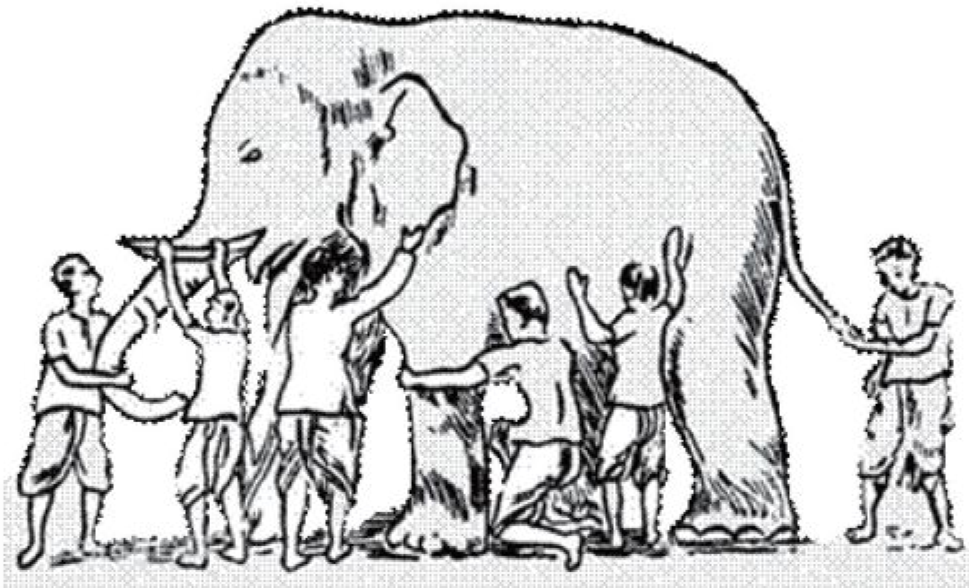
媒介
在延伸
传递效率
N2传递效率
1到N传递效率
经验时代
大数据时代
信息含量
文字时代
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承载方式

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传递结果
信息透明时代
信息不透明时代
传递效率
N2传递效率
1到N传递效率
媒介
在延伸
经验时代
大数据时代
信息含量
文字时代
形象时代
承载方式

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2011[illegible]7[illegible]15[illegible]·[illegible]

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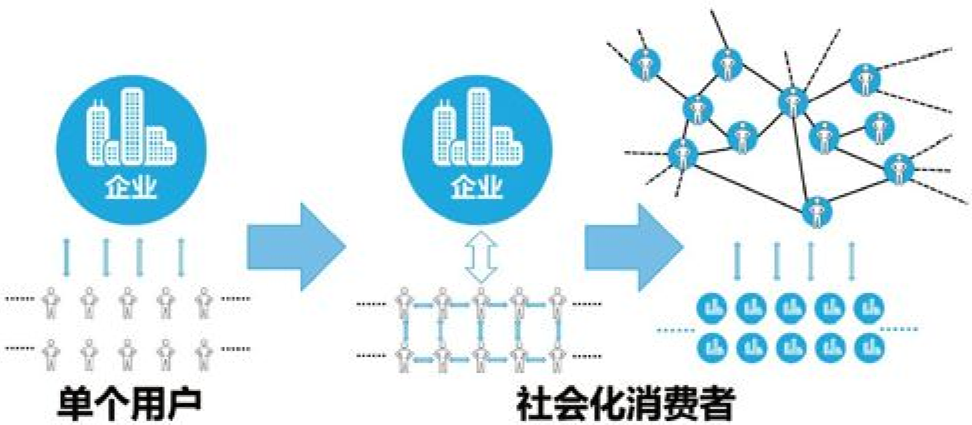
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时间感
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9月10日 晚上23:50
赶在12点前，再祝徐老师节日快乐！感谢您给予我的辅导和帮助
9月11日 下午17:48
您的回复速度还可以，没超过24小时

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人文
在更新
时间感
快时代
慢时代
科层时代
扁平时代
空间感
理性时代
感性时代
思维方式

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SOP（Standard Operation Procedure）[illegible]IOS9000（International Organization for Standardization）[illegible]

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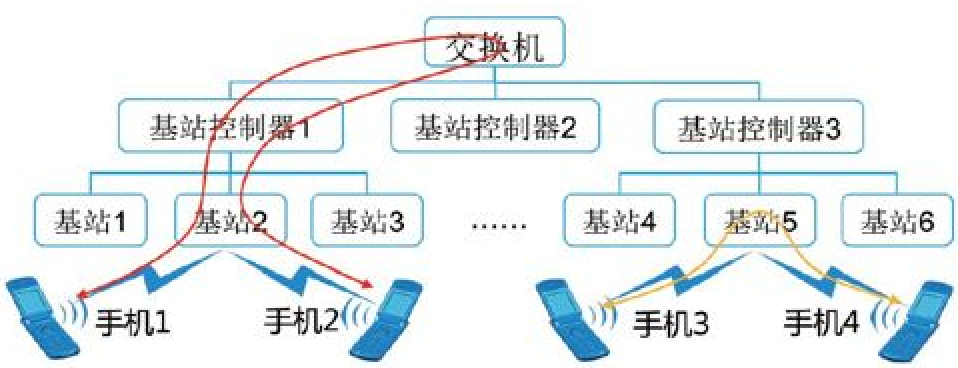
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交换机
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基站控制器2
基站控制器3
基站1
基站2
基站3
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基站4
基站5
基站6
手机1
手机2
手机3
手机4

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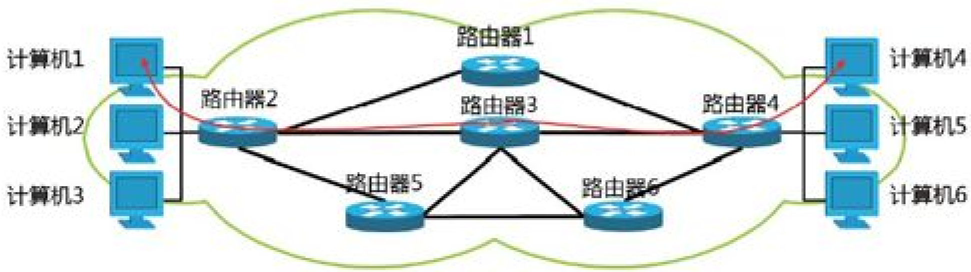
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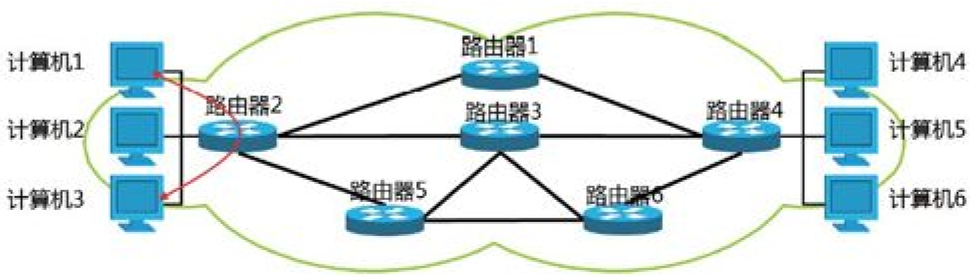
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我的文档 (E:)
QLDownload
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0-MIG愿景传递
0-SOP
0-移动互联网
1-人才培养方案
S3大会
TSTD
产品经理
骏马加速项目
米格大讲堂
用户零距离
核心人员融入方案
领导方案
图片
移动终端
1-知识传递工程
1-助力业务
2-产品圈

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标签
互联网
手机
浏览器
新人
产品
用户
产品经理
iphone
报告
导师
团队
android
运营商
交互设计
tel
交流类
培训类
移动互联网
成长计划
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2014[illegible]8[illegible]21[illegible]·[illegible]“[illegible]”[illegible]66[illegible]

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90后，理想化
自我，自由主义
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现
79后，不确定
焦虑，物质主义
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求
66后，责任感
吃苦，坚持不懈
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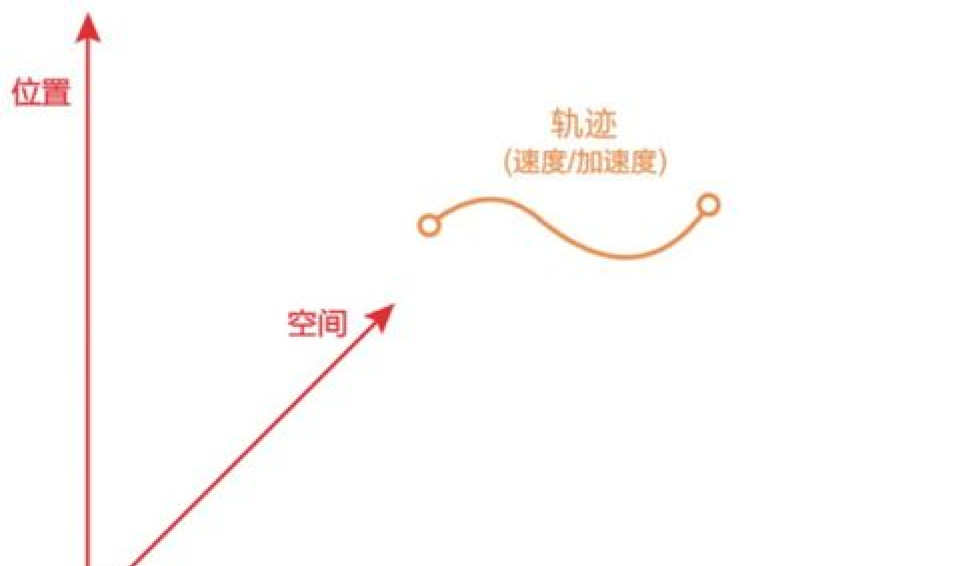
[2] □□□□□□□□80□□90□□00□□□□□□□□□□□□□□□□□2014□8□29□□□
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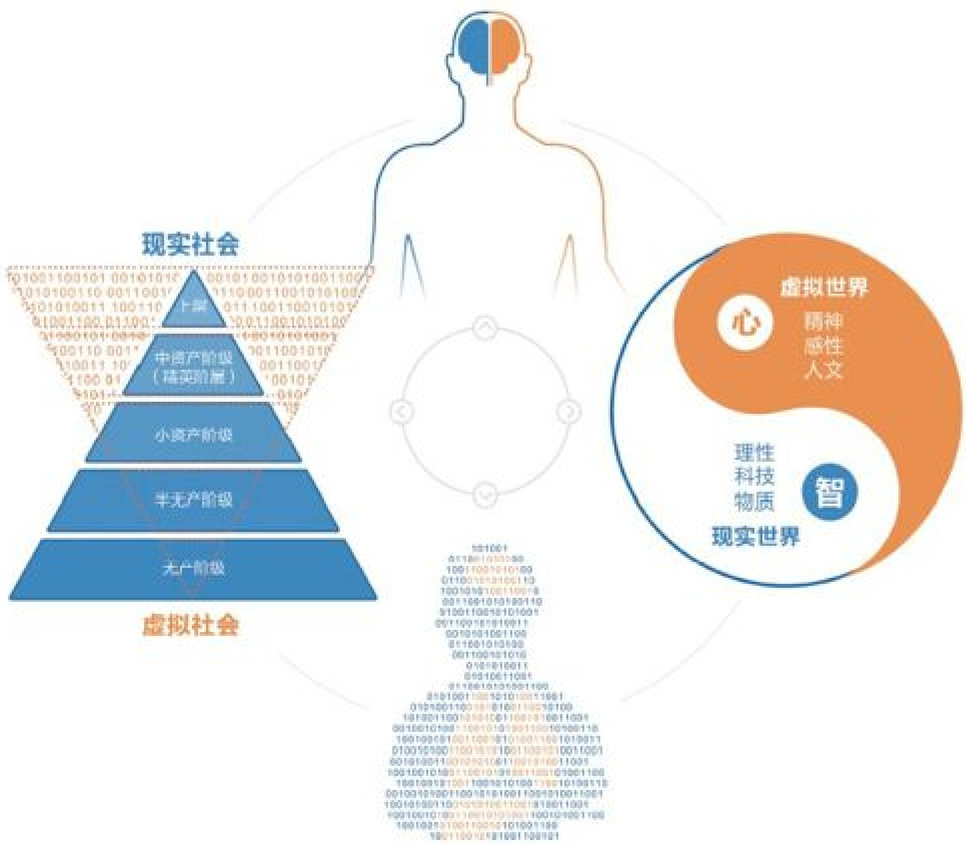
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位置
轨迹
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空间
时间


现实社会
中资产阶级
（精英阶层）
小资产阶级
半无产阶级
无产阶级
虚拟社会
虚拟世界
心
精神
感性
人文
理性
科技
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智
现实世界

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[illegible]2004[illegible]8[illegible]QQ[illegible]SP[illegible]Free WAP[illegible]O2O[illegible]

[illegible]2000[illegible]7[illegible]SP[illegible]2011[illegible]5[illegible]……[illegible]2G[illegible]GSM[illegible]CDMA[illegible]3G[illegible]CDMA2000-1X[illegible]UMTS/WiFi[illegible]WAP[illegible]IVR[illegible]APP[illegible]

[illegible]“[illegible]”[illegible]PPT[illegible]10[illegible]

[illegible]50[illegible]1000[illegible]2000[illegible]

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时代的变换
目标感
娱乐时代
时间感
快时代
空间感
扁平时代
感性时代
思维方式
人文在更新
传递结果
信息透明时代
传递效率
N²传递效率
大数据时代
信息含量
形象时代
承载方式
媒介在证伸
应用
世界的网络化
媒体的社会化
通信的移动化
硬件
多屏争艳
移动终端取代PC
软件
移动OS取代桌面OS
移动APP取代PC应用
科技在换代
移动网络取代固网
数据业务取代话音业务
物联网：网络无所不在
网络


信息入口之争 到 服务场景之争
**平台
云平台
云平台
**平台
有线网络
2.5G/3G/4G网络
WiFi
PC
应用分发
安全
智能手机
APP
中间件
OS
浏览器/社交/搜索/游戏/电商/支付/音乐/视频......
MIUI，ROM
Android/iOS
车联网
硬件
软件
智能TV
各种屏
......
办公室
计算机
游牧中
智能手机
家中
智能电视
智能家居
车中
车联网
小区
小区服务
城市
同城服务
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